ICJI Egrants System

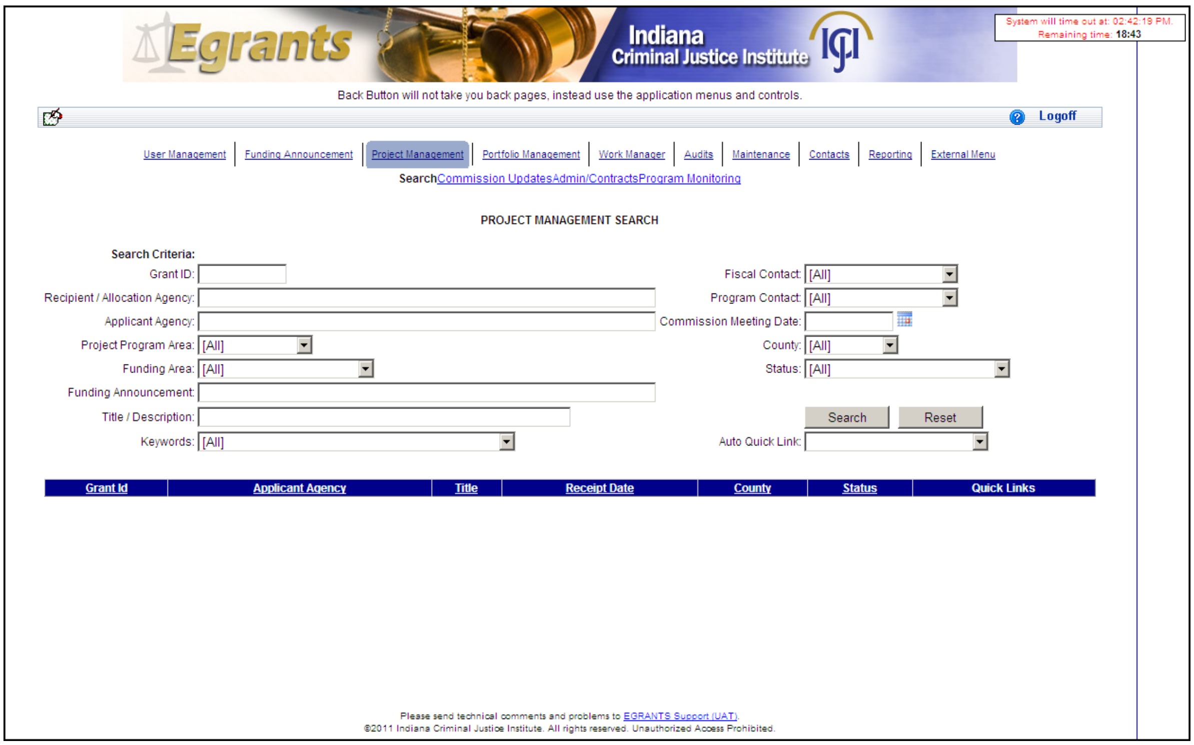
Quick Start Guide

Program Staff's Role in Entering a New Application

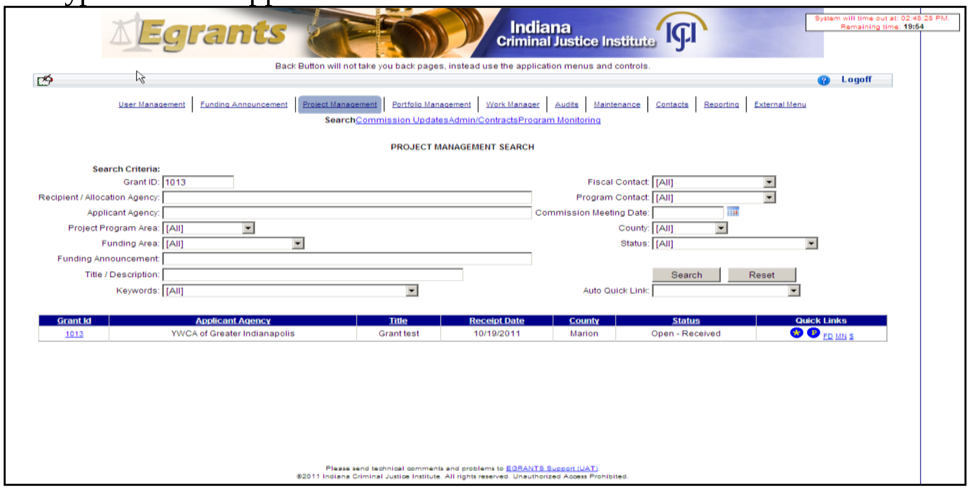
Background: When a new application is received at ICJI, Fiscal Staff enters basic information into the appropriate Funding Announcement in Egrants. Egrants assigns a Grant ID number to the application. Fiscal Staff records the assigned Grant ID number on the "hard copy" of the application. The application is copied and forwarded to Clerical Staff to log and circulate to appropriate Program Staff. Below are instructions for Program Staff to enter the rest of the new application.

Please note: This is a temporary procedure. Training for external users is ongoing and will provide Subgrantees with the ability to submit their own on-line applications. This will eliminate the need for Program Staff to enter the information supplied by the subgrantee in the application.

1. Go to Egrants.
2. Enter your User ID and Password and click on "Login" button on the left side of your screen.
3. Select "Project Management" from tabs across the top of the screen. The "Project Management Search" screen appears.



6. Enter the assigned “Grant ID Number” under “Search Criteria” and click on the “Search” button. Select the “Grant ID” hyperlink that appears at the bottom of the screen.



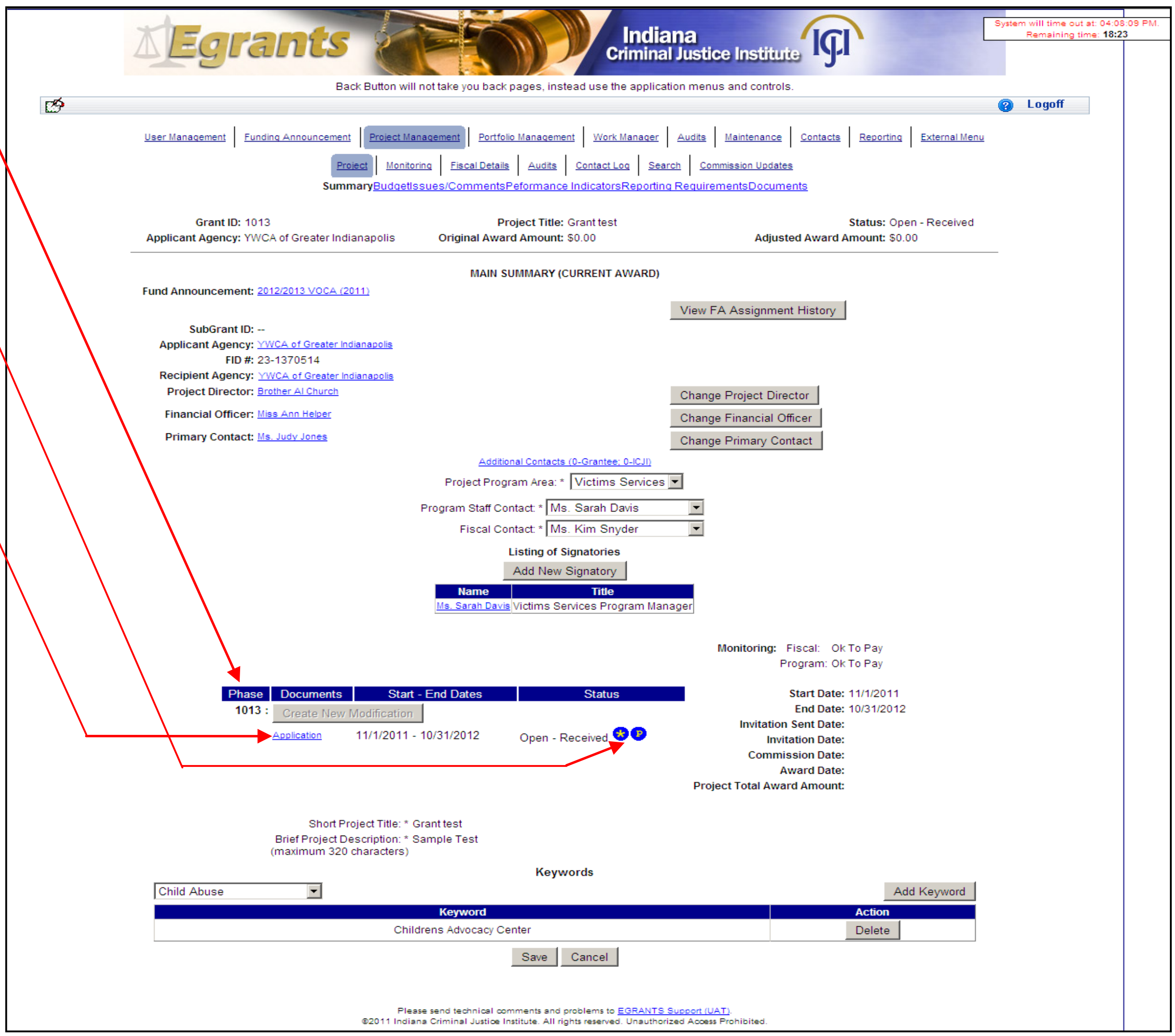
Tip: When clicking on the Search button, Grants appear at the bottom of the page, by default, in descending order based on the Grant ID #. This allows you to see the most current Grants first. You can, however, click on the column headers to change the order of the search results.

7. A “Main Summary” screen appears. Note: You are under the “Project Tab.”

Note the area that displays a grid and lists ALL of the phases of an application.

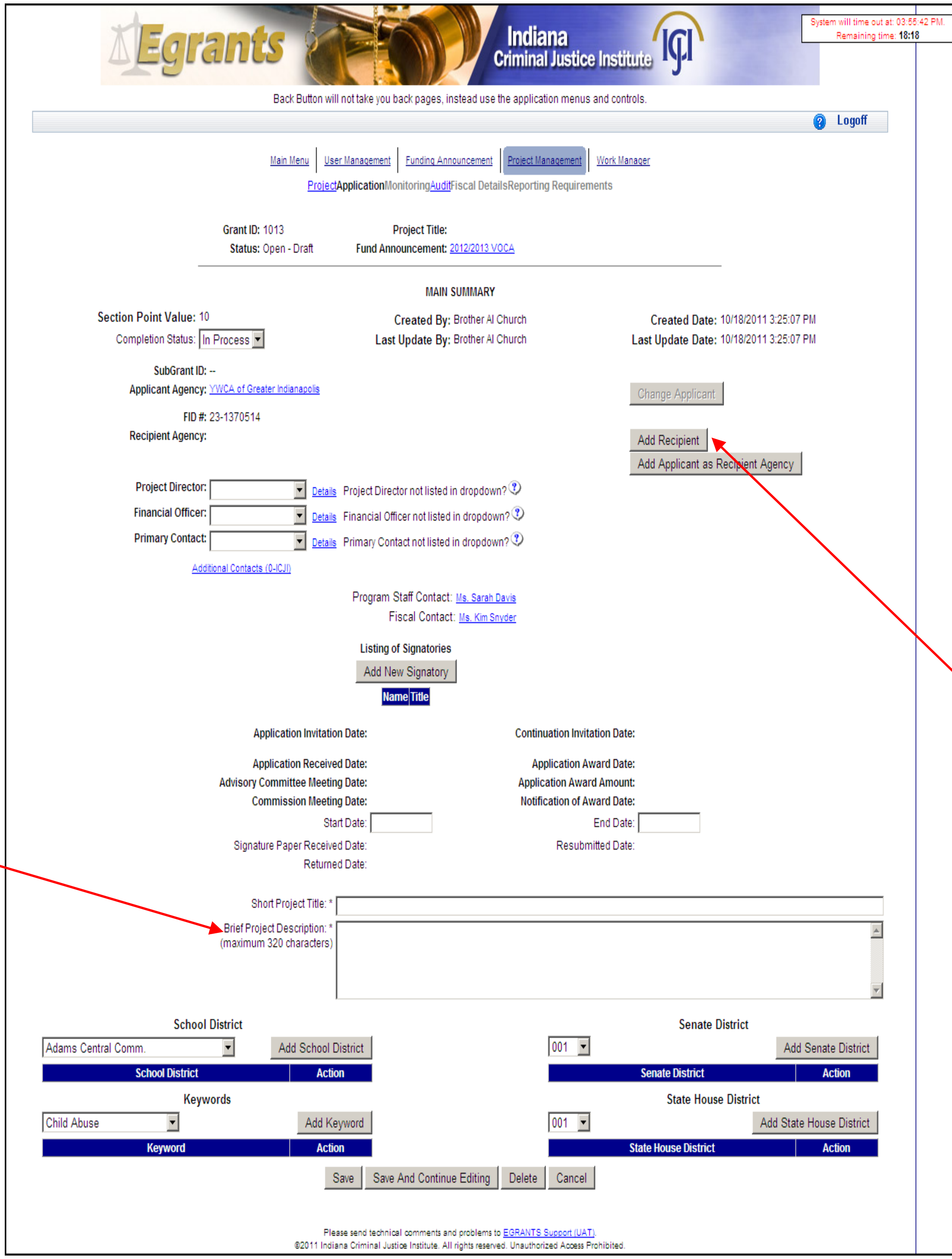
In order to better identify which stage and project are current, symbols are used. An “*” appears next to the current phase and a “P” appears next to the current project.

By clicking on the “Application” hyperlink you will be redirected to the “Application” tab and the “Application Main Summary” screen.



Note: The same general process is used to select or add a recipient, project director, financial director and contact. Please refer to the screen shots below for reference.

8. You are redirected to the "Application" tab and the Main Summary Screen.

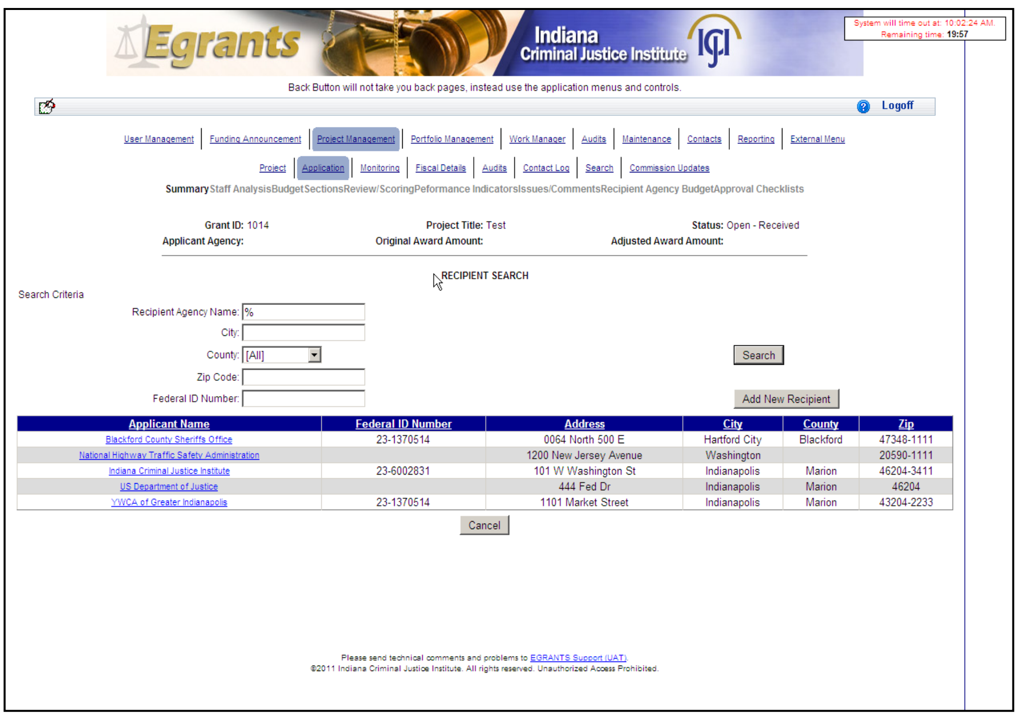


Review, edit, or add the "Short Project Title" and the Brief Project Description. The Brief Project Description is very important as it is used later on for reporting purposes.

Click on the "Add Recipient" button. Follow instructions on the next page.

9. The "Recipient Search" Screen appears.

10. Enter a portion of the recipient agency's name in the box marked "Recipient Agency Name." Click on the "Search" button.
11. A list of previously entered recipient agencies' names will appear.



12. If the recipient agency was previously entered, select the recipient agency by clicking on the hyperlink.

a. “Recipient Agency Details” are displayed.

b. Scroll to the bottom of the screen and click on the “Save” button.

c. Go to step # 15.

13. If the appropriate recipient agency is <u>not</u> found, click on the “Add New Recipient Agency” button on the Recipient Search Screen (shown on previous page).
14. The “Agencies Details” screen appears.

Enter “Agency Details.” At a minimum, fields with asterisks must be completed. **Note: “Preferred Contact Method,” though not marked as required, must be selected.**

Click on “Add New Address,” complete information, and select “Update” button.

Click on “Add Phone Number,” complete information, and select a “Location” that <u>matches</u> the “Location” selected in the “Preferred Contact Method” in “Agency Details” and select “Update” button.

Note: You will not be able to save your information if the locations noted above are not matched. However, you can add “additional” phone numbers beyond the one that matches the preferred contact method.

Scroll to the bottom of the page and click on the “Save” button. You will be directed back to the “Main Summary” screen.

The following steps, demonstrated for “Add Project Director” should be taken to add people such as the project director, financial officer and/or contact by substituting the appropriate button for “Add Project Director” and completing the same steps noted in 15-20.

15. Scroll towards the top right of the screen and click on the “Add Project Director” button. The “Project Director Search” screen appears.
16. Enter a portion of the project director’s last name in the field marked “Last Name” under “Search Criteria.”
17. Click on the “Search” button. A list of previously entered people’s names, potentially everyone is PACS, will appear.
18. If the project director was previously entered, select the project director by clicking on the hyperlink.
    a. “Project Director Details” are displayed.
    b. Scroll to the bottom of the screen and click on the “Save” button.
    c. Go to step # 20.
19. If the appropriate project director is not found, click on the “Add New Project Director” button at the bottom of the screen. The “Individuals Details” screen appears.
    a. Enter “Individuals Details.” **Note: “Preferred Contact Method,” must be selected.**
    b. Click on “Add New Address,” complete information, and select “Update” button.
    c. Click on “Add Phone Number,” complete information, and select a “Location” that <u>matches</u> the “Location” selected in the “Preferred Contact Method” in “Individuals Details” and select “Update” button. **Note: You will not be able to save your information if the locations noted above are not matched. However, you can add “additional” phone numbers beyond the one that matches the preferred contact method.**
    d. Scroll to bottom of page and click on the “Save” button.
20. You will be directed back to the “Main Summary” screen.
21. Contact – Note: When entering from a paper application and no contact is identified, use the Project Director for the Contact as well.
22. Scroll to the bottom of the “Main Summary” screen.
23. Enter the “Application Invitation Date.” This is the date applicants are notified to submit applications.
24. Enter the “Application Receipt Date.” This is the date the application is received at ICJI.
25. Enter the “Advisory Committee Meeting Date.” **Note: This can be entered later if you do not know it at this time.**
26. Enter the anticipated “Commission Meeting Date.” This is essential so that that program summary information can be captured for the Commission Meeting.
27. Enter the “Start Date.” This is when the project starts.
28. Enter the “End Date.” This is when the project ends.

Note: Items 29-32 are only beneficial to ICJI if these fields are consistently completed. Please make every effort to fill them in.

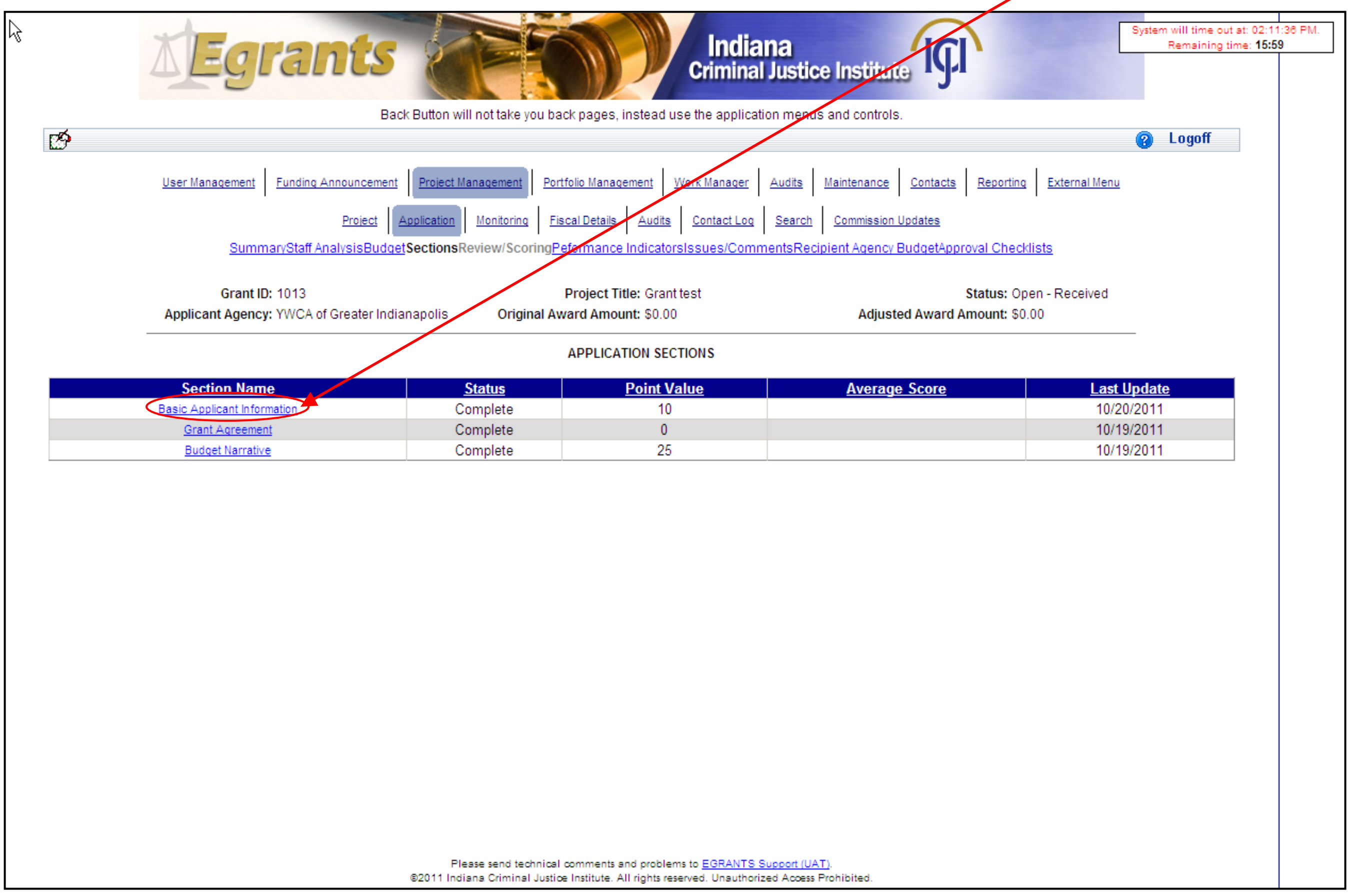
29. Enter the "School District" associated with the application, if known.
30. Enter "Keywords" to enhance future search capabilities. Remember, consistency is the key for maximizing this tool. Note: For the VOCA funding announcement, you will need to capture any of the following 4 keywords from page 3 of the paper application that have any dollar amount identified: Sexual Assault Services, Domestic Violence Services, Child Abuse, and Other Services.
31. Enter the Senate District associated with the application, if known.
32. Enter the House District associated with the application, if known.
33. Click on the "Save" button.

For help in identifying the Senate and House District, go to http://www.in.gov/legislative/index.htm. At the left side of the screen under Legislators, there is option to select either House of Representative or Senate. Once there, you can select to view the selected listing by district.

Note: In the event that more than one House District and Representative appear, see the Legislative/Policy staff at ICJI for a Legislative Precinct Directory to help narrow down the correct Representative.

34. Click on the "Sections" hyperlink at the top of the screen.

35. The "Application Sections" screen appears. Click on "Basic Applicant Information."



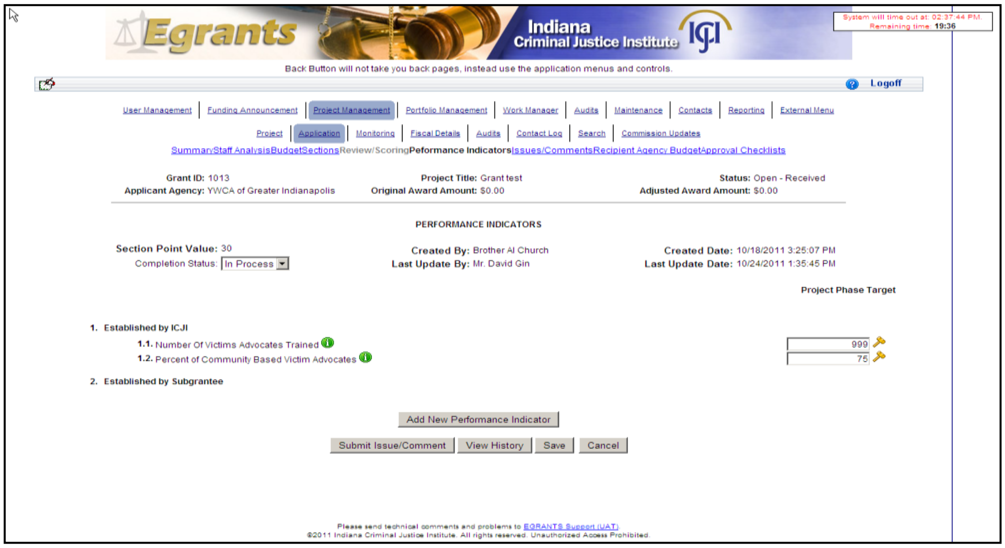
Respond to the questions. Mark Completion Status as "Complete" by selecting from the dropdown box.. Click on the "Save" button.

(Note: Icon indicates required response).

36. You will return to the Application Sections screen. Note the "Basic Applicant Information" is now marked "Complete."

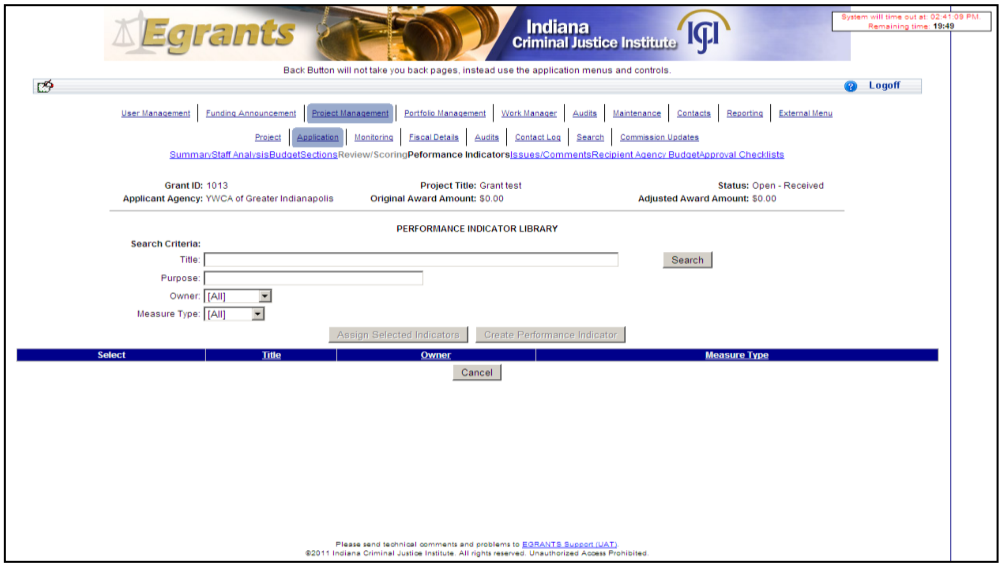
37. Click on the “Performance Indicators” hyperlink at the top of the screen.

38. The “Performance Indicators” screen appears.

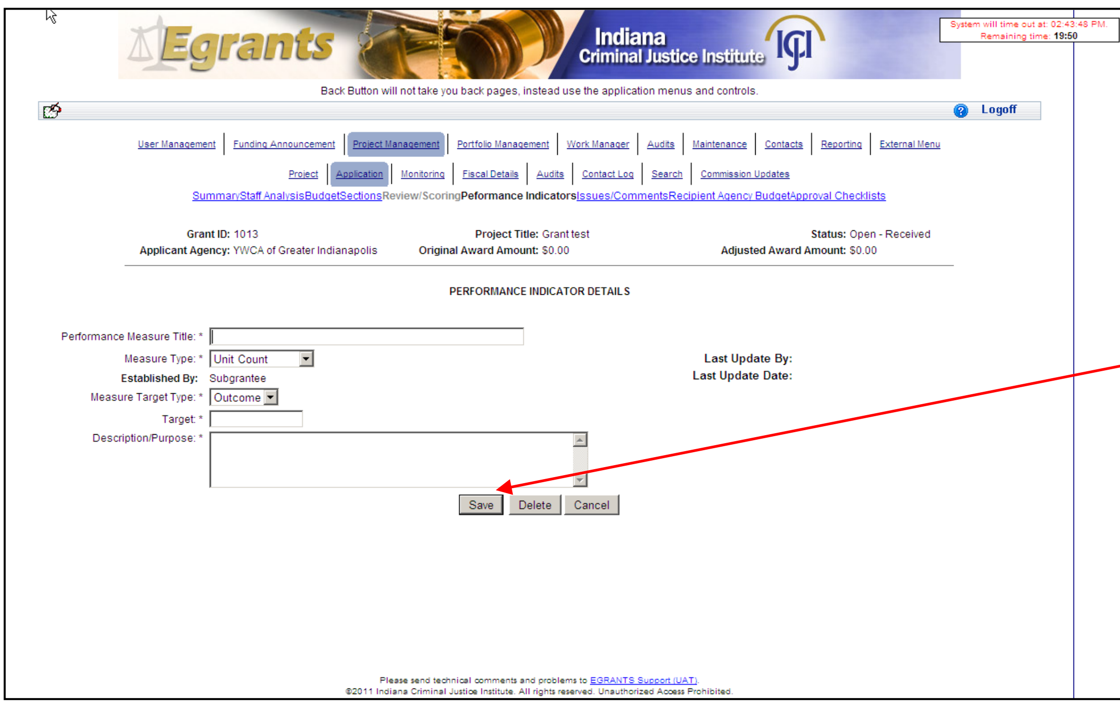


39. Enter the “Target” and click on “Save.”

40. If the Sub-grantee has added additional performance measures, click on the “Add New” button on the previous page and you will be transferred to the “Performance Indicator Library” screen.



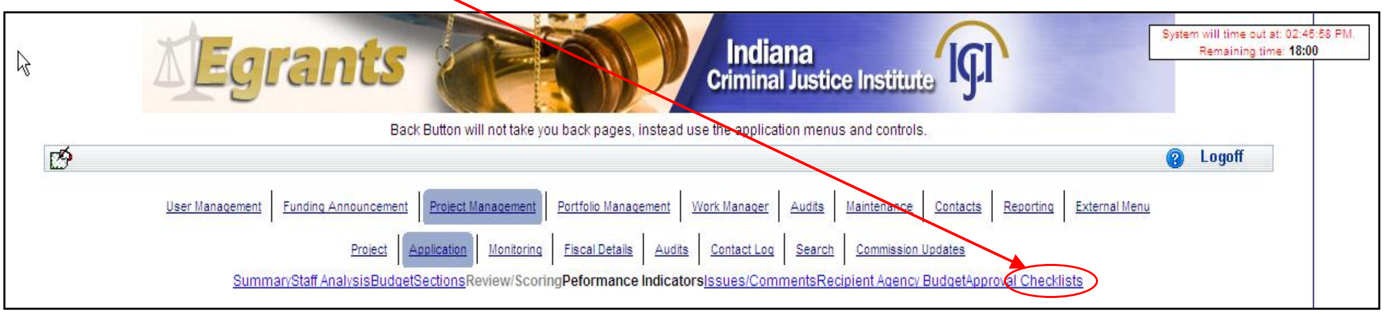
Enter a “Title” and click on “Search.” If no record is found, click on “Create Performance Indicator” to create a new performance measure. You will be transferred to the “Performance Indicator Details” screen.



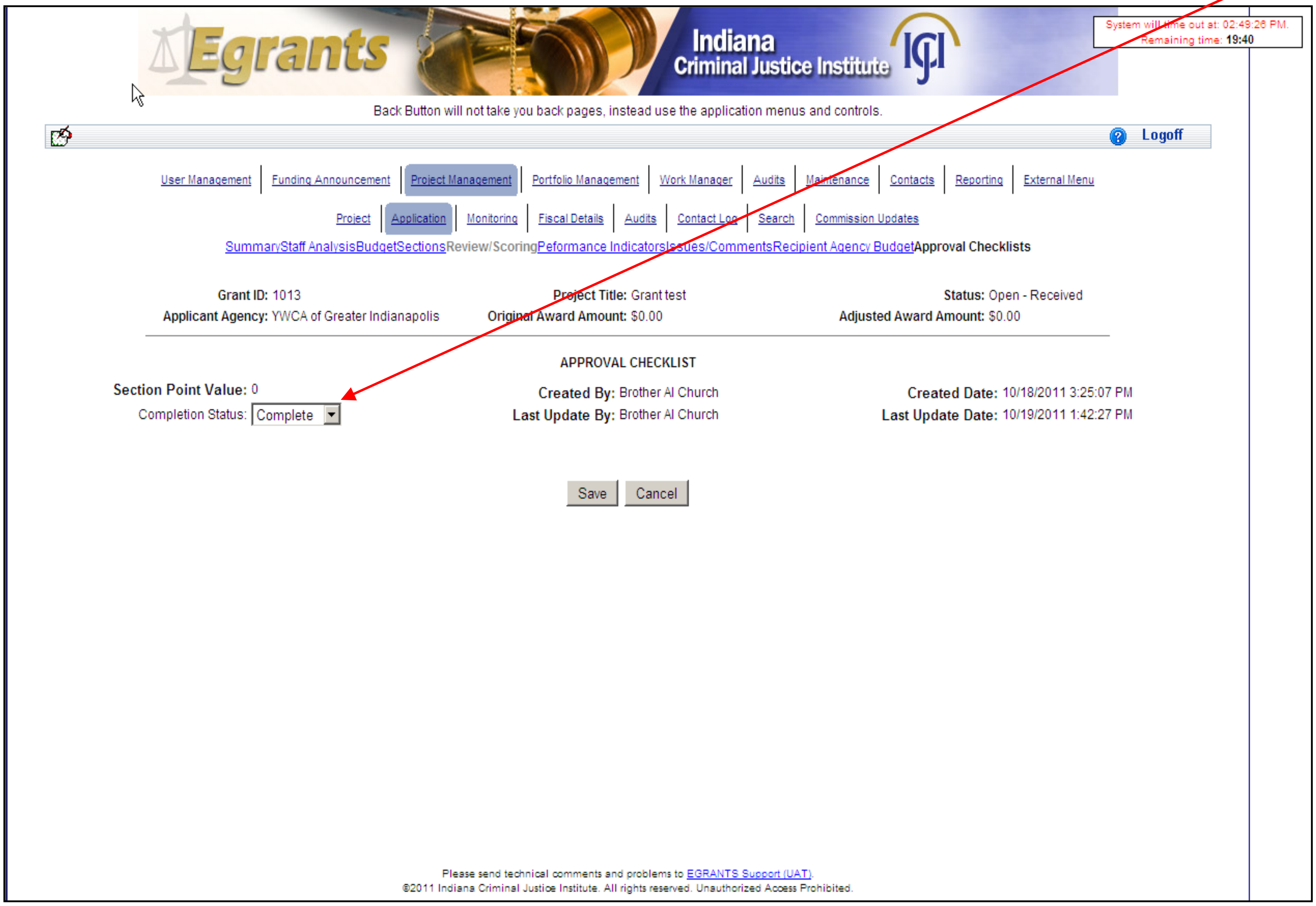
Complete the details and click on “Save.”

When finished, change the Completion Status to "Complete."

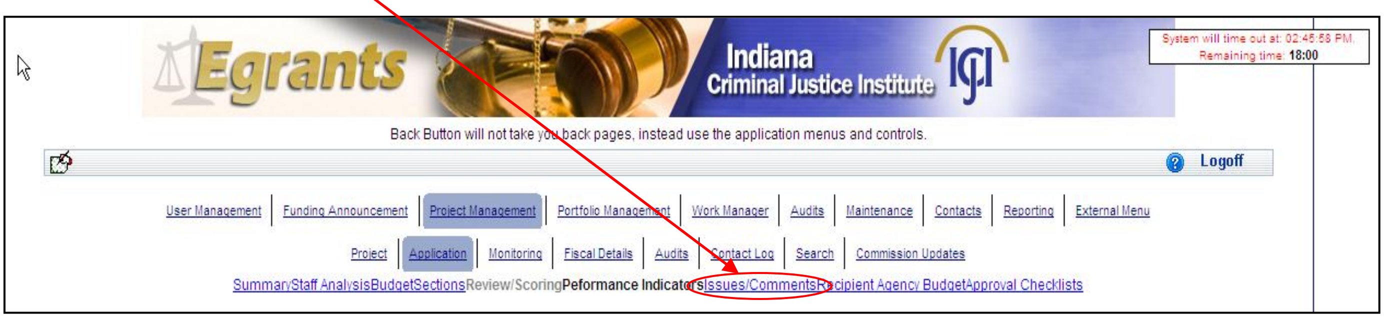
41. Click on "Approved Checklists" hyperlink at the top of the screen.



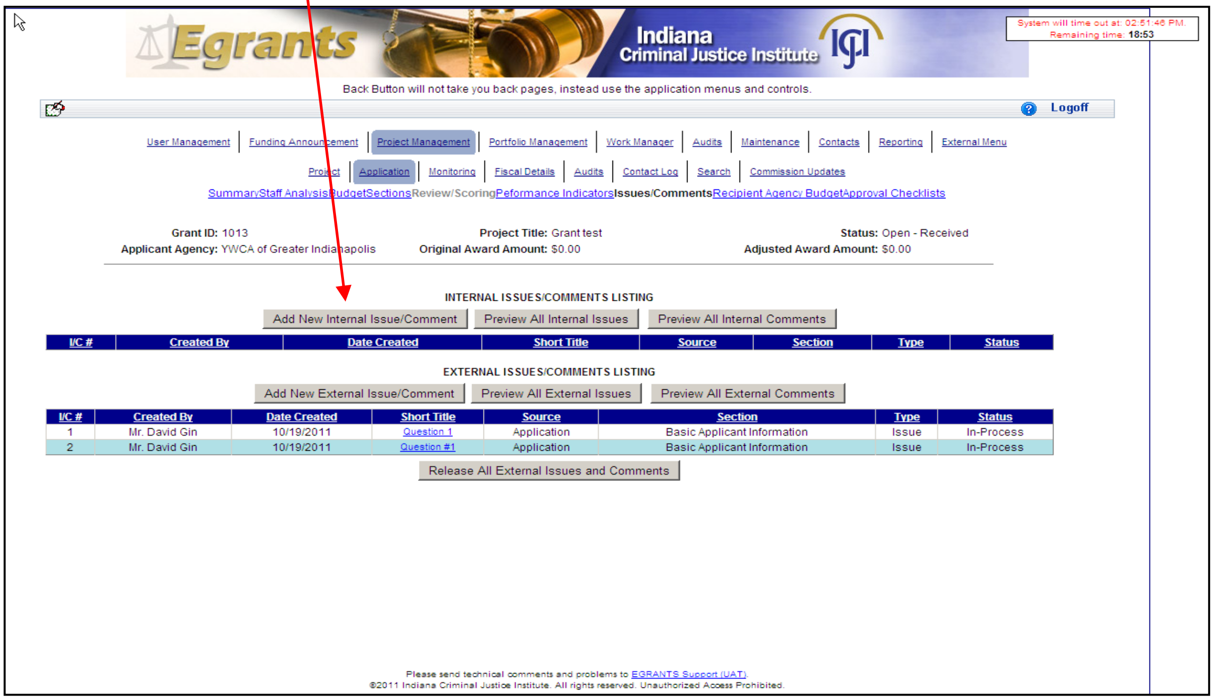
42. Complete the list of questions by using the dropdown boxes. Move the Completion Status to “Complete.”



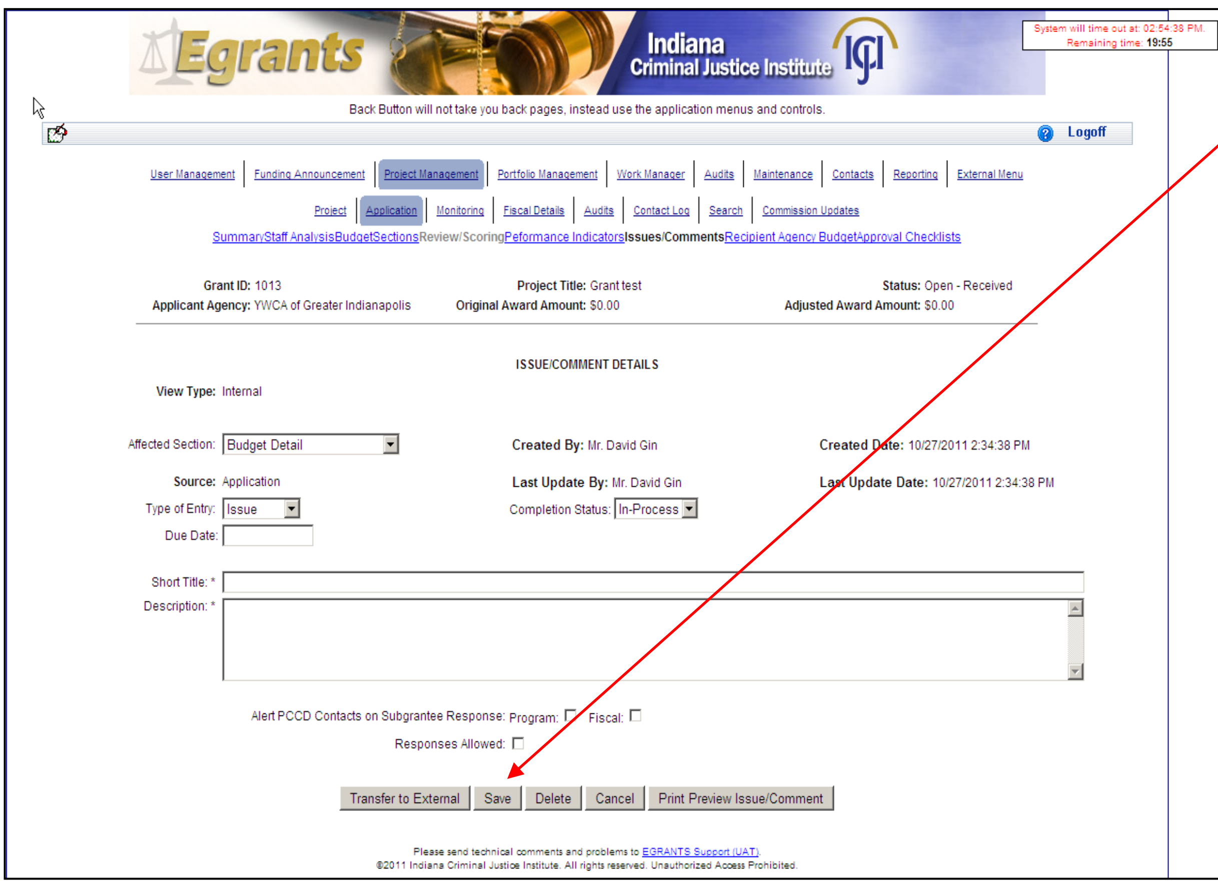
43. Click on the “Issues/Comments” hyperlink at the top of the screen.



44. Create Issues or Comments by clicking on the appropriate buttons on the screen.

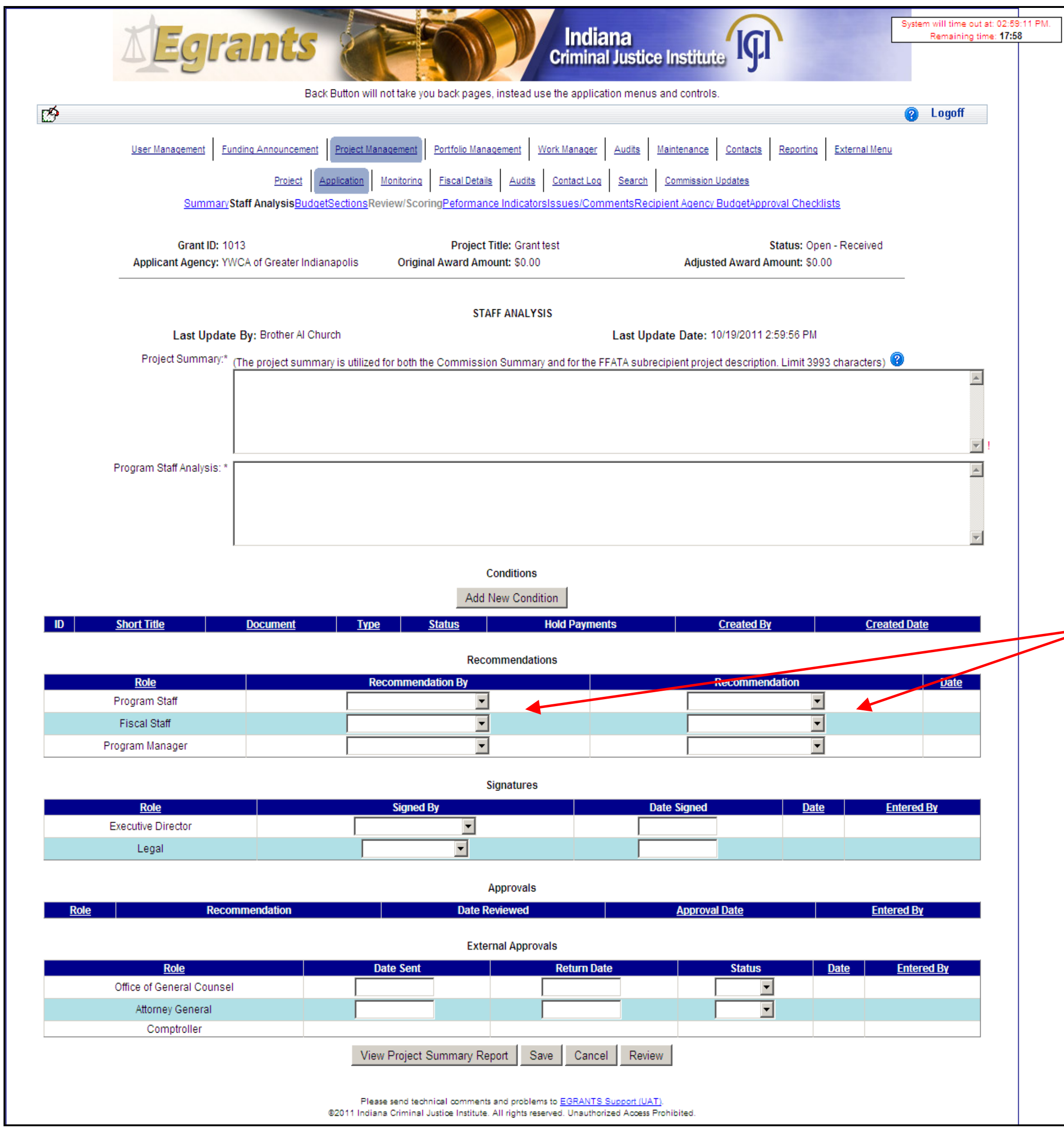


45. You will be transferred to the “Issues/Comments Details” screen. Complete the fields and click on “Save.”



46. Click on the “Staff Analysis” hyperlink at the top of the screen.

47. Text for “Project Summary” pulls from “Main Summary.” Enter “Program Staff Analysis.”



Select “Program Staff,” “Fiscal Staff,” and “Program Manager” from dropdown boxes. Choose the appropriate “Recommendations” from the dropdown boxes. Click on “Save.”